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Example Group Service Selection Worksheet

This document is an example of how the Group Service Selection Worksheet might be completed by a typical group practice which has 21 clinical staff members, including 2 prescribers, and 4 administrative staff members (total 25 staff members.)

# Services Recipe Function List

|  |  |  |
| --- | --- | --- |
| **Function** | **Service Name** | **Notes** |
| Record-Keeping | My Favorite Practice Management System |  |
| Payment Processing | My Favorite Practice Management System  |  |
| Invoicing | My Favorite Practice Management System |  |
| Billing (if not done by workforce) | My Favorite Practice Management System |  |
| Inbound Voice Calling | RingRx |  |
| Outbound Voice Calling | RingRx |  |
| Conventional (SMS) Texting | RingRx | Clinicians will use discretion to decide which clients may need/benefit from using conventional texting (as opposed to the secure messaging through client portal.) In such cases, the clinician will offer the Request for Nonsecure Communications process to the client. |
| Secure Texting/Mobile Messaging | My Favorite Practice Management System | Reception team will talk to clients about downloading the mobile app before their first session. Clinicians will follow up on that if the client hasn’t downloaded it but wants to text with their clinician. |
| Conventional Email | Google Workspace (Gmail) | Clinicians will use discretion to decide which clients may need/benefit from using conventional email (as opposed to secure messaging through client portal in My Favorite Practice Management System.) In such cases, the clinician will offer the Request for Nonsecure Communications process to the client. |
| Secure Email | My Favorite Practice Management System + Hushmail for Healthcare (backup for non-clients) | Admin team has secure email service through Hushmail to utilize when a need for sending high sensitivity PHI outside of client portal of My Favorite Practice Management System arises.When providing superbills and records releases to clients, we do so through the client portal in My Favorite Practice Management System |
| FAX | RingRx |  |
| Appointment Scheduling | My Favorite Practice Management System  |  |
| Client Self-Scheduling | My Favorite Practice Management System  |  |
| Appointment Reminders | My Favorite Practice Management System  |  |
| Appointment Calendar | My Favorite Practice Management System for clinical calendar, Acuity Scheduling for wellness groups | The clinical calendar in My Favorite Practice Management System is also synchronized to Google Calendar as a backup |
| Intake Forms | My Favorite Practice Management System  |  |
| Electronic Signatures for Online Forms | My Favorite Practice Management System  |  |
| Contact Form on Website | Google Workspace (Forms) |  |
| Videoconferencing (i.e. for online therapy) | Google Workspace (Meet), My Favorite Practice Management System for backup |  |
| Telehealth Waiting Room | Google Workspace (Meet) |  |
| Telehealth Whiteboard | Google Workspace (Meet) |  |
| Telehealth Breakout Room | Google Workspace (Meet) |  |
| Telehealth Video Recording | Google Workspace (Meet) |  |
| Telehealth Group/Family Meetings | Google Workspace (Meet), My Favorite Practice Management System for backup | My Favorite Practice Management System for backup only accommodates 2 clients for groups |
| E-Prescribing | ChARM | For 2 prescribers on staff |
| Office Software (i.e. Writing Documents and Spreadsheets) | Google Workspace (Docs + Drive) |  |
| Internal Team Communication | Google Workspace (Chat + Meet) |  |
| Web Hosting | WordPress |  |
| Practice Internet Connection | Ziply Business Fiber | Team members also use personal cellular data and may use home Internet connections according to the Home Office Internet Policy |
| VPN (Virtual Private Network) | TunnelBear Teams | Provided only to clinical staff. Admin staff’s only BYOD registered devices are mobile phones with data connection, VPN not needed for admins as they will only use data or connect to trusted WiFi on mobile phones.  |
| Password Management | LastPass Teams |  |
| LastPass | LastPass Teams |  |
| Cloud Data Backup |  | All data is on online services which perform their own backups |
| CRM ( Customer Relationship Manager) | Keap |  |
| Email/Marketing Newsletter (e.g. MailChimp, Constant Contact, Keap) | Keap | Ensure clients on Newsletter list opt-in (no auto opt-in) to receiving Newsletter and that Request for Nonsecure Communication related to Newsletter sends has been obtained, per presentation by Eric Strom, JD PhD LMHC on email marketing and HIPAA. (It is pay-what-you-can, so it is accessible to all: <https://personcenteredtech.com/product/jun2020conf-practcare-wholetrack/>)  |
| Directory Profiles | Psychology Today |  |
| Accounting (if not done by workforce) |  |  |

## Workforce Members’ Personally-Owned Service Functions

Indicate which Functions you will permit/expect workforce members to fill using their personally-owned services.

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| **Function** | **Notes** |
| Practice Internet Connection | Cellular data on personal phone services may be used to give an Internet connection to devices used for practice business. Team members who use home offices may use their home Internet connections so long as they set up their security according to our Home Office Internet Policy (see <https://personcenteredtech.com/courses/teletherapymobile2020/> for more info on home office Internet) |
| VPN (Virtual Private Network) | Team members may use personally-owned VPNs, but we supply clinical staff with a TunnelBear VPN account |
| Password Management | Not permitted. Team members are required to use the LastPass account assigned to them to store passwords for all their practice accounts |

# My Service Cards

Paste below the Specific Service Cards that you chose for your recipe.

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| My Favorite Practice Management System

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| **Function** | **Notes** |
| Record-Keeping |  |
| Payment Processing | Reception will talk to new clients on the phone about signing up for the client portal |
| Invoicing | Reception will talk to new clients on the phone about signing up for the client portal |
| Billing |  |
| Secure Email | Only when pushing superbills and records releases to the client portal. Reception will talk to new clients on the phone about signing up for the client portal |
| Secure Texting/Mobile Messaging | Reception will talk to new clients on the phone about signing up for the client portal and downloading the mobile app. Clinicians will discuss practice Communication Policy and methods during initial session. |
| Client Self-Scheduling |  |
| Appointment Scheduling |  |
| Appointment Reminders | Talk to clients at first session about signing up for appointment reminders and giving the authorization to send unsecured texts and/or emails |
| Appointment Calendar | Will be automatically synchronized with Google Calendar |
| Intake Forms |  |
| Electronic Signatures for Online Forms |  |
| Videoconferencing (i.e. for online therapy) | Backup only, if needed |
| Telehealth Waiting Room |  |
| Telehealth Whiteboard |  |
| Telehealth Breakout Room |  |
| Telehealth Video Recording |  |
| Telehealth Group/Family Meetings |  |
| E-Prescribing |  |
| Internal Team Communication |  |

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| [Google Workspace](https://workspace.google.com/pricing.html) (aka GSuite, aka Google Apps for Business)Essentially, a paid version of a Google account. Provides a wide variety of services and will enter into a Business Associate Agreement to cover those services. Business Plus Plan tier necessary for Vault and additional HIPAA compliance necessary/supporting functionality.

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| **Function** | **Notes** |
| Cloud Data Backup |  |
| Inbound Voice Calling |  |
| Outbound Voice Calling |  |
| Conventional (SMS) Texting |  |
| Conventional Email |  |
| Appointment Calendar | Will be a backup calendar for the calendar in My Favorite Practice Management System |
| Intake Forms |  |
| Videoconferencing (i.e. for online therapy) |  |
| Telehealth Waiting Room |  |
| Telehealth Whiteboard |  |
| Telehealth Breakout Room |  |
| Telehealth Video Recording | Do not use static room link for sessions that will be recorded (supervisee sessions) |
| Telehealth Group/Family Meetings |  |
| Contact Form on Website | Google Sheet export and Keap Integration facilitate efficient tracking of referrals and waiting list |
| Office Software (i.e. Writing Documents and Spreadsheets) |  |
| Internal Team Communication |  |

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| [RingRx](https://ringrx.com/pricing/)More expensive than iPlum, but also has much more robust-and-ready support. Can work with VoIP-ready desktop phones as well as phone app and web app.

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| **Function** | **Notes** |
| Inbound Voice Calling | Deskphones + softphone app for admin team. Softphone app for clinical team.  |
| Outbound Voice Calling | Deskphones + softphone app for admin team. Softphone app for clinical team.  |
| Conventional (SMS) Texting | Will only be used with clients when request for nonsecure communications is in place, and there is a want/need for conventional SMS texting as opposed to secure messaging through client portal |
| FAX |  |

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| [Hushmail for Healthcare](http://hushmail.com/personcenteredtech)Secure (and conventional) email service that includes secure forms and e-signatures from a company with high trustability and strong security culture. Does not integrate with Google Workspace Gmail or Microsoft Office 365 email, however. Does not offer forced-TLS with default to escrow style secure email, which means secure emails are sent only as escrow style emails (more rigermoral in terms of user experience for email recipients than forced-TLS with default to escrow.) Affordability + robust secure form functionality make this service a strong option for practices that utilize secure communication functionality from another service as their primary secure communications mode -- e.g. secure messaging in practice management/EHR system or VoIP phone system -- but need/want to supplement that functionality with an additional option for secure communication.Hushmail sponsors Person Centered Tech’s articles and emails. You can read our writeup about them and get a lifetime 15% discount here: <https://personcenteredtech.com/hushmail-for-healthcare-review/>

|  |  |
| --- | --- |
| **Function** | **Notes** |
| Conventional Email | Will use Gmail |
| Secure Email | For use by admin team with non-clients when secure email is required, or as a backup for clients when an alternative to secure communication through the portal in My Favorite Practice Management System is needed. |
| Contact Form on Website | Will use Google Form |
| Intake Forms | Will use My Favorite Practice Management System as primary. Hush Secure Forms is backup for additional secure form needs. |
| Electronic Signatures for Online Forms |  |

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| [ChARM](https://www.charmhealth.com/ehr/ehr-pricing.html#e-rx-epcs)Charm offers both e-prescribing and e-prescribing of controlled substances as add-ons to their free or per-encounter priced plan tiers, which makes it an affordable and scalable e-prescribing service for practices that need e-prescribing, but don’t need it for all their providers or who don’t want their practice management/EHR selection to be based off of the necessity of e-prescribing functionality being included (e.g. want to use a therapy oriented practice management system that doesn’t include e-prescribing.)

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| **Function** | **Notes** |
| E-Prescribing |  |

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| [Keap](https://keap.com/pricing)Formerly Infusionsoft. Configuring complex campaign sequences and automations can be very involved, and -- when PCT last used it -- bug prone, requiring extensive support. However, for the less complex needs of most group practices it generally works well for single email campaign sends.

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| **Function** | **Notes** |
| Email marketing/newsletter | Keap [will execute a BAA and do not require a specific plan tier](https://knowledgebase.constantcontact.com/articles/KnowledgeBase/6240-business-association-agreements?lang=en_US). They rightly provide [guidance](https://help.keap.com/help/hipaa-security-controls) that the user also has responsibilities for ensuring their use of email marketing newsletters meets their HIPAA compliance requirements.  |

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| [Keap](https://keap.com/pricing)Formerly InfusionSoft.

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| **Function** | **Notes** |
| CRM | Keap [will execute a BAA and do not require a specific plan tier](https://knowledgebase.constantcontact.com/articles/KnowledgeBase/6240-business-association-agreements?lang=en_US). Keap can integrate into Google Workspace Gmail to perform CRM functionality. |

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| [TunnelBear](https://www.tunnelbear.com/teams)Easy to install and configure. Team plan makes it efficient to set up service for all workforce the practice is providing VPN service for. TunnelBear doesn’t have as many servers as NordVPN, meaning the speed impact of using a VPN can be greater with TunnelBear. Each user account on TunnelBear provides VPN service for 5 simultaneously connected devices, so a user account is not required to provide for each device that requires a VPN. TunnelBear is more economical than NordVPN for those who want a monthly billing option.

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| **Function** | **Notes** |
| VPN |  |

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| [LastPass](https://www.lastpass.com/products/team-password-manager)

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| **Function** | **Notes** |
| Password Manager |  |
| Password Management Shared Vaults |  |

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| [Wordpress.com](https://wordpress.com/pricing/)

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| **Function** | **Notes** |
| Web Hosting |  |

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| Directory Profile Service: Psychology Today

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| **Function** | **Notes** |
| Directory Profiles | We turn off the contact form and phone number routing, so no PHI is handled |

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| Local Internet Service: Ziply Business Internet

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| **Function** | **Notes** |
| Practice Internet Connection |  |

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# My Services List

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| --- | --- | --- | --- | --- |
| **Service Name** | **BAA Executed Date (Or reason no BAA is needed)** | **Service Tier** | **$/user/mo.** | **Subtotal $/mo.** |
| My Favorite Practice Management System | Jan 31st, 2013 | Group | $39 ($59 for first user) | $917 (22 paid accounts, + 3 free biller/scheduler accounts) |
| Google Workspace | Jan 31st, 2013 | Business Plus | $18 | $450 |
| RingRx | Jan 31st, 2013 | Grow (x 21 users)Clinic (x 4 users) | $19$25 | $399$100 |
| Hushmail for Healthcare | Jan 31st, 2013 | N/A | $3.39 | $16.99 |
| ChARM | Jan 31st, 2013 | EPCS (x 2 users) add-on to free tier | $21 | $42 |
| Keap | Jan 31st, 2013 | Pro | NA | $203 |
| TunnelBear VPN | Conduit, no BAA needed. | Teams Annual | $5.75 (x 21 users) | $120.75 |
| LastPass | No PHI is handled. | Teams | $4 | $100 |
| WordPress.com | No PHI is handled. | Business | N/A | $25 |
| Psychology Today Profile | We turn off the contact form and phone number routing, so no PHI is handled | N/A | $30 (single practice profile, not individual provider accounts) | $30 |
| Ziply Business Internet | Conduit, no BAA needed. | Fiber 500/500 | N/A | $100 |
| **TOTAL COST $/Mo.** | $2503.74 |